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EXTENSION CENTER FOR COMMUNITY VITALITY

Addressing Workforce and Economic Development through Regional Collaboration

A guide from literature and practice

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A GUIDE FROM LITERATURE AND PRACTICE

June 5, 2018

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University of Minnesota Extension prepared this report for Southeast Minnesota Together with support from the EDA Center at the University of Minnesota-Crookston.

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Executive Summary

In 2015, a group of concerned citizens in Southeastern Minnesota began a conversation on the topic of collaboration to address workforce issues. This group, called Southeast Minnesota Together, is now considering how its work might evolve.

Many issues related to economic development, such as housing, transportation, employment, education, and childcare are not constrained by political boundaries or organizational constructs. These challenges are dynamic and intersectional, and effective solutions often emerge from cross-sector and cross-border collaborations.

To inform the group's next steps, Southeast Minnesota Together engaged University of Minnesota Extension to perform research on regional collaboration. What follows is a report generated from that research. The report aims to inform the effort of Southeast Minnesota Together, as well as other groups' attempts to address issues related to regional workforce and economic development. The report draws on academic literature, insights, and lessons learned from other regional efforts in the United States. It also includes interviews with local stakeholders to provide local leaders with ideas and information to consider as they decide how to structure their efforts moving forward.

Research indicates there is no single best model for cross-sector, cross-border collaboration. Successful models are highly dependent on local context. What works in one region may not work in another. Principles of integrative leadership, highly participatory processes, and a locally appropriate structure and governance mechanism, however, are common features of successful efforts. Additionally, within Southeast Minnesota, many examples of functional formal and informal collaborations exist, showing such efforts do occur in the region.

Research indicates that, moving forward, the group should:

- Define the geographic and thematic scope of the effort and ensure the work aligns with regional values. Determine which priorities are regional and which are best solved by a sub-regional effort.
- Build trust and legitimacy by demonstrating impact and value. Communicate extensively across the region to share the group's effort, how to get involved, and the progress being made on key initiatives.
- Thoughtfully, and more deeply, engage a broader range of stakeholders. Pursue opportunities to engage key leaders or stakeholder organizations. Consider opportunities to build trust and social capital between stakeholders in and around Rochester and the surrounding region.
- Since Southeast Minnesota Together is a non-mandated coalition, an emergent planning feature seems appropriate. A structure and governance model that facilitates progress on shared priorities and goals but also allows flexibility to adapt and evolve is also suggested. The identification of a network manager is critical.

- A mental model that recognizes the group's work as a cycle of exploration, development, maturity, and revision may be useful. Collaborative efforts, because they engage multiple parties over time, are not generally static entities. The structure used, the issues addressed, the players involved, and the approaches implemented can all evolve.

This work is not easy. However, the rewards for pursuing cross-sector, cross-border collaboration can be mighty.

Introduction

Southeast Minnesota Together (SE MN Together) is a collaborative regional volunteer network of organizations and individuals that came together in 2015. The effort was as an experiment in cooperative action to empower smaller Southeast Minnesota communities to jointly address the region's key issues. The group's first endeavor involved engaging, encouraging, and activating the region to work together to pursue strategies that will address the region's workforce shortage. Now in its third year, the network is considering the future of its work.

This study explores models for regional collaboration that address issues related to the workforce shortage—and beyond—in Southeast Minnesota. Study findings can inform SE MN Together's organizational efforts, as well as those of other groups, as they consider approaches to solving issues that transcend geographic, political, and sectoral boundaries.

Study methodology involved a literature review, a scan of local and national collaboration models, and interviews with regional stakeholders with relevant experience and insight regarding the topic.

Insights from Literature

Regional collaboration is often pursued to address issues that transcend sectors and geographic borders and sectors. These issues include workforce availability, housing, childcare, transportation, social structures for attracting and retaining residents, and more. In addition to their geographically borderless nature, these challenges are interconnected to some extent, so changes in one area may affect other areas. Several theoretical lenses exist that provide tools for understanding the conditions that may inform our understanding of 21st century regional collaboration.

Such complex and dynamic challenges require a multisector, boundary-crossing approach to problem solving. As such, this literature review explores theories of complex dynamic systems, multisector collaboration, integrative leadership, regionalism, and governance to suggest how SE MN Together might work with stakeholders to address these issues in a coordinated and strategic way.

Complex Dynamic Systems

The basis of this theoretical framework recognizes that addressing challenges in complex and dynamic systems is different from addressing challenges in simple, static situations. Dynamic systems are characterized by non-linear connections between various elements. It means a regional workforce issue does not involve just one community and one strategy. Rather, having an adequate workforce affects a broader regional economy. To effectively address the issue means considering a community's dynamics in housing, childcare, education, mobility, and social environment. To address an issue like workforce, considerations must be taken to recognize related

elements in the system. The other component to this theory is that the issue, and the environment within which it exists, constantly evolves.

Figure 1: Building Consensus in Complex Dynamic Systems

- Includes representatives of all relevant and significantly different interests
- Driven by a purpose and task that is real, practical, and shared by the group
- Self-organizing, allowing participants to decide on ground rules, objectives, tasks, working groups, and discussion topics
- Engages participants to keep them at the table, interested and learning through in-depth discussion, drama, human, and informal interaction
- Encourages challenging the status quo and fosters creative thinking
- Incorporates high-quality information of many types and assures agreement on its meaning
- Seeks consensus only after discussions have fully explored the issues and interests and significant effort has been made to find creative responses to differences

Source: Innes and Booher, 1999

An article in the *Journal of the American Planning Association* (Innes & Booher, 1999) provides some insight into how public managers (e.g., government and non-profit staff) can most effectively operate in such a system. Innes and Booher introduce the concept of emergence, which means the system evolves as those within it collect resources and generate new solutions. They argue, "The result is increasing competence for the system as a whole in the form of greater productivity, stability, or adaptiveness" (p. 417). They also suggest consensus building among actors is the most effective method to mobilize diverse stakeholders to take coordinated action on the elements within the system. In addition, consensus building in itself is an adaptive and evolving methodology, which fits with the nature of the system in which it is operating. Such a process can help communities learn and think creatively about possible solutions. According to Innes and Booher, the group must "experiment, take risks, and make mistakes from which it learns. It must engage and empower all those with interests and relevant knowledge" (p. 418). While no formula guarantees a specific outcome, they do offer some suggestions for designing an effective process, which are highlighted in Figure 1.

Spruill, Kenny, and Kaplan (2001) argue that voluntary action is necessary for system-wide effects. They also argue that continually monitoring results and feedback about the activities throughout the process is critical to understanding the system and affecting change within it.

Other scholars (Lichtenstein et al., 2006) also explore leadership and action within complex adaptive systems. They note that, in such systems, leadership emerges through a series of interactions and activities and often involves individuals taking leadership roles at various points. Additionally, scholars like Lichtenstein, et al., argue that relationships across networks and among diverse individuals are at the core of efficient, coordinated collective action in complex systems.

Integrative Leadership and Regionalism

Barbara Crosby and John Bryson (2010) have published extensively on the topic of integrative leadership. They define it as "bringing diverse groups and organizations together in semi-permanent ways, and typically across sector boundaries, to remedy complex public problems and achieve the common good" (p. 211). Their work identifies how the actions of integrative leaders can influence the success of collaborations.

Integrative leaders understand the environment in which they are operating and see how changes in the environment may offer new opportunities. They have a systems perspective and use stakeholder identification and assessment to understand the environmental context in which they need to operate—such as who has the authority, technical expertise, and information to address the issue. They also know how to engage these individuals and motivate them to take action.

Crosby and Bryson (2010) also describe how successful integrative leaders use public forums to help achieve stakeholder alignment on an issue and possible solutions. Such forums allow for shared meaning to surface. Creating space for shared meaning to emerge is, Bryson and Crosby argue, the primary task of the leader. Once stakeholders develop a shared meaning, or understanding of, an issue and possible future scenarios, boundaries become less fixed. This allows movement toward new projects and programs, increasing the likelihood of advancing a shared vision. Integrative leaders also track outcomes from their work and help the group learn from failures, celebrate successes, and recalibrate as the environment evolves.

In addition to building a shared understanding, leaders must help build trust among network actors. In her work *Regionalism on Purpose* (2001), Kathryn Foster suggests successful leadership mitigates the challenges of regionalism by building strong regional networks. She contends that successful regional efforts are deliberate, goal-oriented, and inclusive. She also postulates that new regional leadership is driven by the need to "inspire, motivate, and empower action in a networked, shared-power world" (p. 1) as opposed to past leadership traditions that reflected more of a command and control, single leader approach. A model she calls "regional stewardship" reflects the idea of building broad coalitions to create a comprehensive and coordinated approach to developing and realizing a regional vision.

Foster's work also explores regionalism versus localism. She argues that regionalism for services makes sense when it can achieve economies of scale, has significant impacts on addressing an issue or leveraging an opportunity, and addresses something that requires cross-border collaboration. It also makes sense when consumer desires vary little and a standardized level on equity is warranted.

Foster (2001) and others, including the University of Montana's Public Policy Institute (2008) and Winer and Ray (1994), suggest a number of factors that influence the success of regional efforts, including:

- **Focusing** on a critical issue and unique purpose that people are likely to support.
- **Adopting integrative leadership** that encourages shared leadership roles and invites others to participate in the process. Those involved include a cross-section of representatives from affected groups that see value in collaborating. Reciprocal benefits emerge through a process that is inclusive and collaborative. Mutual respect, understanding, and trust exists—or is purposefully built—among those involved.
- **Introducing an open and inclusive process** in which participants are intentionally identified, engaged, and activated. This includes anyone with a stake in the effort, those needed for successful implementation of the effort, and those who may contest the effort if not involved. The group's vision is defined, and pathways for achieving this vision are co-created with stakeholders, ensuring those involved share an interest in both the process and the outcome.
- **Defining a region that matches people's interests**. Often, regions are defined through a sense of place and/or the geography in which the issue exists.
- **Using action-oriented but emergent and adaptive processes.** The group maintains a long-term perspective on regional change but strives to build momentum and trust to achieve a long-term vision. Concrete, attainable goals and objectives are established, but the collaborative demonstrates flexibility in organizing and acting. The group learns as it goes and adapts as new problems and opportunities emerge and others fade away. This may also include a commitment to recognize and develop new leadership.
- **Gathering the right resources**. Resources may include leadership, partner organizations, financial support, and technical information. Sufficient funds and a skilled convener are critical.
- **Implementing broad and ongoing communication**. The group moves from vision to action by leveraging formal and informal methods to communicate broadly with stakeholders, link with other established entities, and coordinate action across the network. Goals are widely publicized and outcomes are measureable or quantifiable. Both formal and informal communication links are created. Communication is open and frequent. Close relations with media are created to help foster regional understanding and action.
- **Establishing governance**. The organization and its policies are the means to an end, not the end in itself. Governance offers sustainability by providing a framework for coordination of ongoing efforts. Often, roles are clearly defined and policy guidelines are developed.
- **Creating a favorable environment**. A history of collaboration or cooperation, and a favorable social and political climate, can affect success. The group should be viewed by others as a leader able to help address regional concerns.

These above principles provide a guide for collaborating successfully across geographies and sectors, groups, and organizations, regardless of how the effort is structured.

In *Perspectives on Regional Collaboration* (2010), Brian Dabson describes the theory of "new regionalism," which is an idea explored by some academics. The foundations for new regionalism exist in voluntary collaboration and cooperation, with an emphasis on regional economic competitiveness. This phenomena has emerged as cities and regions begin to acknowledge a global context for competitiveness and recognize that factors affecting their competitiveness (e.g., the environment, workforce, transportation, fiscal disparities, and social issues) and cross-jurisdictional boundaries.

Understanding this context, however, does not automatically lead to collaboration. Skepticism about efficiency or effectiveness of regional governance—voluntary or mandated—can remain. Here, Dobson offers suggestions for those pursuing regional collaboration. His suggestions encompass:

1. A sense of shared destiny.
2. A broad agreement on approach (e.g., aggressive vs. incremental, mandate vs. consensus).
3. A full range of interested stakeholders engaged in the process.
4. A consensus approach used to articulate issues and take action.
5. An understanding of structural incentives and barriers that prevent collaboration.

Dobson also describes four models for regional collaboration, which are outlined below (Figure 2).

Figure 2: Models of Regional Collaboration

Intermittent Coordination	Temporary Task Force	Permanent or Regular Coordination	Networks
• Policies and procedures of two or more organizations adjust to accomplish an objective • Low-level interaction • Arm's length commitment	• Established for a specific and limited purpose • Disbands once the purpose is achieved.	• Multiple organizations agreeing to engage in limited activity for a specific purpose through a formal arrangement • Intensive resource exchange, minimal risk	• Tightly intermingled collaboration arrangements • Interdependent and strategic actions
Example: Disaster response	Example: Major sports event	Example: Regional planning organization	Examples: informational networks, development networks, outreach

			networks, and action networks.
Source: Dabson (2010)			

Collaboration and Governance

Stakeholders across sectors achieve a shared goal in different ways. They may do so through cooperation, coordination, collaboration, integration, establishment of an entirely new entity, or anything in between. As the SE MN Together group describes themselves as collaborative working across sectors—including government, private, and non-profit sectors—this concept of cross-sector collaboration was further explored.

Cross-sector collaboration experts Barbara Crosby, John Bryson, and Melissa Stone provide a review of literature on the topic (2006). They define cross-sector collaboration as the "linking or sharing of information, resources, activities, and capabilities by organizations in two or more sectors to achieve jointly an outcome that could not be achieved by organizations in one sector separately" (p. 44).

Their analysis explores the establishment and sustainability of cross-sector collaborations and reveals several themes: preconditions, processes, structure and governance, constraints and accountability, and linkages. A few of their findings are particularly relevant to this analysis.

First, they discovered the literature suggests cross-sector collaborations are more likely to succeed when "one or more linking mechanisms, such as powerful sponsors, general agreement on the problem, or existing networks are in place at the time of the initial formation" (p. 46). They also describe the significance of having numerous sponsors and champions providing formal and informal leadership during the effort.

Second, agreement on the purpose and framework for action is critical. They cite many studies that reinforce the value of a highly participatory planning process with stakeholders and implementers. Furthermore, they contend success is most likely when "planning makes use of stakeholder analysis, emphasizes responsiveness to key stakeholders, uses the process to build trust, and the capacity to manage conflict, and builds on the distinctive competencies of the collaborators" (p. 48). There are numerous options for designing structure and governance of collaborations. Purpose and proposed action of a collaboration can inform decisions about these elements.

Will goals be met through cooperation, coordination, or collaboration? Cooperation is more informal. Coordination requires more planning and role assignment. Collaboration is the most complex and infers longer-term engagement, joint pursuit or pooling of resources, and possibly the establishment of a new organization (Winer & Ray, 1994).

Crosby, Bryson, and Stone (2006) also found the literature suggests structure and governance of collaborations is likely to evolve over time due, in part, to complexity in local environments and ambiguity in membership.

But how formal or informal should governance be? What is the right structure or governance model? Academics and practitioners agree no silver bullet or single best practice model exists for regional collaboration. Governance design varies, depending on the purpose of the network, its size, its membership, and other elements. It may also change over time as the network, and its activities, evolves. In addition to the priority activities, the goals of those involved, as well as the local culture and conditions, help determine the right model to use.

While there is no one-size-fits-all approach, some academics offer considerations for pursuing particular structures or governance models.

Winer and Ray (1994), for example, suggest a focus on organizational efficiency. A good structure helps members effectively manage the extra work of the collaboration, such as sharing information, allocating resources, and making decisions. While some may default to creating a new organization, that may not be necessary to achieve the group's goals. Winer and Ray illustrate two typical structures, which they call a table and a wheel. A table structure infers that everyone comes together to make decisions. The wheel structure has smaller groups take action (spokes), conferring with and reporting to a central coordinating group (hub). The authors also acknowledge that there may be hybrid combinations of these two basic structures.

A helpful definition of collaborative governance is found in *An Integrative Framework for Collaborative Governance* (Emerson, Nabatchi, & Balogh, 2012). They define it as, "The processes and structures of public policy decision making and management that engage people constructively across the boundaries of public agencies, levels of government, and/or the public, private and civic spheres in order to carry out a public purpose that could not otherwise be accomplished" (p. 2).

In *Connecting to Change the World*, Plastrik, Taylor, and Cleveland (2014) suggest retaining an informal governance structure for as long as possible. They contend that it takes time for the network to figure out what it hopes to accomplish and how to achieve it. Additionally, they argue effective governance structures should enable, not dictate, action. Informal structures tend to enable action and are less likely to be dictatorial in nature. Emerson et al. (2012), appear to concur with the use of informal governance models early in the effort, or for smaller, simple collaborations. Longer term, or more complex, collaborations benefit from more formal mechanisms, like charters, by-laws, rules, and defined procedures.

Crosby, Bryson, and Stone (2006) found that, while informal arrangements regarding a collaboration's structure and activities can work, more formal agreements support alignment and accountability. Elements of a formal agreement may include a mission

or purpose statement for the group, resource commitment and allocation, defined leadership, and decision-making structures. Over time, early agreements will evolve as the work and membership of the collaboration advances. They also point out that an emergent planning processes is common in non-mandated collaborations and that governance is often an emergent event in grass-roots collaborations. In a later work (2015), Crosby, Bryson, and Stone cite Thomson and Perry (2006) who indicate that governance frameworks can emerge through group processes that lead to increased levels of trust. They can also lead to the formation of network-level values and norms, which, in turn, inform and guide behavior and activities.

Kenis and Provan focus on network governance models in their 2007 work. They define a network as three or more organizations coming together to address a collective, shared goal. They postulate that governance of some sort is necessary to ensure the network's work is coordinated and resources are effectively garnered and allocated. Additionally, governance helps to ensure effective resolution of disagreements.

Three types of governance suggested by the authors include participant governed, lead organization governed, or governance through a network administrative organization. Kenis and Provan also provide insight into when and where each form can be most effective. They suggest that the type of governance depends on several factors, including trust among actors, number of participants, consensus on the group's goal, and the need for network-level competency. Figure 3 summarizes these structures.

Figure 3: Network Governance Typology

Form	Description	When this model works best
Participant Governed (shared network governance)	• No separate entity created. In some cases, some of the administration and coordination may be performed by a subset of the full network. • Governance is by network participants. • Governance is formal (regular meetings of designated reps) or informal (work ongoing but meetings only as needed). • Partners collectively make decisions about network activities. • Governance depends on involvement and commitment of all or a significant subset of organizations comprising the network. • Power is symmetrical.	• Few participants • Strong consensus on the goal • High levels of trust among all participants • Organizations could address issue on their own
Lead Organization Governed	• One organization in the network serves as the lead and all major activities and key decisions are coordinated by that organization. • Lead organizations provides administration for the network and/or facilitates member	• Moderate number of participants • Trust is scattered among organizations involved, highly concentrated with one organization

	activities to achieve network goals, which may be closely aligned with the goals of the lead organization. • Power is asymmetrical.	• Moderately low level of goal consensus • Organizations may be able to address issue on their own
Network Administrative Organization (NAO) Governed	• A new entity (government, nonprofit, or for-profit) is created to govern the network and its activities. • It may be small or large with a board comprised of some or all of the network members.	• Moderate to many participants • Moderate levels of trust • Moderately high goal consensus • Organizations involved unable to achieve goal alone
Source: Provan and Kenis (2007)		

No matter the governance model selected, Kenis and Provan argue it is imperative to have a network manager—someone who coordinates the network's day-to-day tasks.

Crosby, Bryson, and Stone (2006) and Crosby and Bryson (2010) explore success factors, as well as challenges to processes, structure, and governance in collaborations. Some challenges they highlight are collaboration type, power imbalances, and "competing institutional logics." Collaborations that encompass system-level planning efforts require the most effort and compromise. They note conflict may emerge when the organizations involved differ in power (e.g., size, resources, constituency, or reputation). To manage this, they suggest stakeholders should explore all alternative scenarios together (through strategic planning or scenario development) rather than try to convert others to a pre-existing vision. Collaborative efforts might also experience conflict emerging from "competing institutional logics." This concept can be understood as "historical patterns, both symbolic and material, that establish the formal and informal rules of the game and provide interpretations of actions" (Crosby, Stone, & Bryson, 2006, p. 50). Individuals and organizations bring these logics with them to the collaboration table. Communication and stakeholder involvement can be helpful in managing competing logics. Ansell and Gash (2007) also found a pre-history of antagonism can hinder collaboration on shared issues. They suggest collaboration can only successfully move forward if there is a high degree of interdependence, or efforts are undertaken to increase trust and social capital among players.

Collaboration Examples from Beyond Southeast Minnesota

North Central Minnesota: The Resilient Region Plan

The Resilient Region Plan encompasses the territory covered by the Region Five Development Commission (Cass, Crow Wing, Morrison, Todd, and Wadena Counties in North Central Minnesota). It began as an opportunity to garner $800,000 in grant funding from the federal Housing and Urban Development's Sustainable Communities Regional Planning initiative. The Resilient Region Plan's stated mission is "To create a community-driven, University-assisted partnership around planning sustainable regions that will integrate the disciplines of housing, transportation, natural

environment (land use) and economic development (including energy and local foods) that will encompass in-reach strategies through highly involved civic engagement in an effort to build an inclusive region that will provide opportunities, be free from discrimination and improve the quality of life of all residents."

STRUCTURE AND GOVERNANCE

The group used what they called a "distributed leadership model." Specific roles included the host organization, advisory board, a core team, champions, and ex-officios. The host organization was the Region Five Development Commission, and their executive director initiated the grant process and served as fiscal agent, convener, and administrator. The 25-member advisory board was comprised of representatives from across the region and sectors including the public, private, and non-profit. Its role was to monitor and oversee the process. The core team, which included staff from the Region Five Development Commission (R5DC), Central Minnesota Initiative Foundation, Clean Energy Resource Teams (CERTs), Central Minnesota Housing Partnership (CMHP), Envision Minnesota, EnSearch, Inc., and the University of Minnesota Regional Sustainable Development Partnerships, designed the process. Once the plan was developed, 22 champions—two per action area—self-identified, or were recruited from sectors or stakeholder groups whose work aligned with the theme of the action area to lead the implementation of an action area. Eleven "ex-officios" were recruited to serve as the action area coordinators, sending out meeting reminders, taking meeting notes, etc.

PROCESSES

The core team designed their planning process around regional community engagement. The 18-month process engaged more than 600 citizens. During the first six months, they hosted a series of five meetings to lay the foundation of their effort, including data review, identifying regional assets, scenario planning, and initial recommendations development. They also identified common themes among the initial focus areas of land use, economic development, transportation, and housing. During the remaining nine months, they convened four stakeholder forums. The first forum reviewed scenarios and asked participants to vote on the preferred scenario for each issue area. The second forum asked for feedback on draft materials. The third forum was an opportunity for participants to see how the core team used their feedback, to review the draft policy toolkit, and to begin to identify regional champions for the plan. The fourth meeting was a launch of the plan, a celebration of the work accomplished to date, and $4 million in funding that they had secured for the implementation of projects.

ACTIVITIES

In addition to planning forums, the team also hosted workshops on the project and related topics that involved a partnership with the University of Minnesota, Green Step Cities, and others. The intention was to update stakeholders on the work and gather insights for the plan itself. To increase participation, the group coordinated the timing

of their activities with gatherings of existing groups, such as the Minnesota Department of Transportation's Standing Committee to Advance Modal Planning Integration and regional housing dialogues to gather input.

The group took a multi-modal approach to communicating and engaging with multiple audiences. The range included personal contact at standing meetings, printed flyers, email newsletters, letters, press releases, radio, testimonials, and InCommons, an online platform for community-based problem solving.

OUTCOMES

The planning process resulted in the creation of 11 action areas, including education and workforce development, efficiency and effectiveness, transportation, economic engines, connectivity, energy, healthcare, housing, changing populations, and natural resources and development patterns. Each action area had two champions and an ex-officio, along with other team members and implementation partners. The action area teams determined meeting schedules (some monthly and some quarterly) to work together with resource organizations (using existing networks) to identify priority projects, seek funding, and implement projects. All champions meet quarterly to report progress.

The plan has garnered more than $40 million for implementation of a variety of strategic priorities. Additionally, the group created documents and templates for use by communities in the region. Such templates and documents include a policy toolkit (for ensuring a resilient region), a comprehensive model plan, an affordable housing location model, sample ordinances, city and county land use policy analysis, and a zoning typology. The team's work continues today.

KEY LEARNINGS

In a presentation to another regional group, the leadership team highlighted some factors they believed contributed to their success. These factors include:

- Partners with a shared understanding of the needs of their constituents.
- Participation from key stakeholders.
- The ability of partners to put the needs of constituents above any turf issues.
- Partners that exhibit civility and mutual respect.
- Clarity in roles, responsibility, and accountability.
- Blended resources across funding streams to support coordination.
- The coordinating entity having a stake in the game.

Northeast Ohio: Fund for Our Economic Future

The Fund for Our Economic Future (The Fund) was established in 2004. It is an alliance of funders, including foundations, universities, business and civic associations, governments, and individuals. The fund encompasses 18 counties across Northeast Ohio and includes the cities of Akron, Canton, Cleveland, and Youngstown. The Fund

formed around a shared purpose to advance economic growth and opportunity for the region's citizens. The primary focus of the group's efforts was job creation (supporting business development by focusing on regional assets), job preparation (coordinated approach to preparing residents for current and future opportunities), and job access (breaking down spatial and social barriers to employment).

STRUCTURE AND GOVERNANCE

The Fund is a 501c3 membership organization. Membership is comprised of voting and non-voting members. To be a voting member, organizations must contribute at least $100,000 over three years. Financial contributions of less than $100,000 constitute non-voting members. For voting membership, it is one member, one vote, regardless of the amount contributed. Each voting member serves on the board. The group currently has 39 voting members. The board meets quarterly to discuss regional issues, set strategy, review metrics and performance of the organization, and approve grants for initiatives that support shared priorities. Between board meetings, members convene committees that shape and guide the work of the organization. There is a 17-person executive committee, comprised of elected officers, committee chairs, initiative leaders, at-large members, and large funders that provide oversight of staff and program implementation.

PROCESSES

The membership engages in a strategic planning process every three years to assess The Fund's work and to guide its future direction.

ACTIVITIES

The organization advances its mission by convening collaborating organizations across the region. It also works to align the efforts of various stakeholders, and members pool funds for shared priorities. Additionally, the organization supports research on key topics that inform its work and the work of its partners. Examples include a report on the geography of jobs and an asset map of additive manufacturing.

OUTCOMES

Since 2004, The Fund states it has raised more than $100 million to support research, convening, and grantmaking that aligns with regional priorities. Impacts from these initiatives have included the retention or creation of more than 21,500 jobs, an addition $930 million in payroll, and attracting $5 billion in capital to the region.

KEY LEARNINGS

An organization member wrote a collaboration handbook highlighting lessons learned during their process to create a regional collaboration. The first message was, "Do not do it unless you have to," as collaborative efforts can be "difficult and messy." The publication, authored by Chris Thompson (2016), goes on to describe the preconditions and elements for effective collaboration. He suggests required pre-conditions should be a compelling cause, galvanizing leadership, and the involvement of high-performing organizations. He describes the elements of an effective

collaboration as capacity (an entity to provide backbone functions), a cyclical process of exploration, development, maturity and creative destruction, and collaborative (or shared) leadership.

Envision Utah

In the late 1980s, a group of civic leaders met to pursue regional economic development efforts, focusing on business retention and attraction. As regional economic growth accelerated, a new effort called Envision Utah emerged. It launched in 1997 in an effort to stimulate conversation and action related to regional growth projections, including how to mitigate any potential negative environmental and quality of life consequences. Envision Utah is a cross-sector collaborative effort that convenes stakeholders to co-create local and regional development frameworks.

The geography for this effort initially focused on the Greater Wasatch Area, a 10-county region around Salt Lake City and Provo. The organization's mission is to "help residents of the Greater Wasatch Area find a way to deal effectively with the growth-related challenges facing the region while preserving Utah's high quality of life for future generations."

STRUCTURE AND GOVERNANCE

The organization is a non-profit with 13 staff members. Its governance structure includes a 24-member executive committee and board of directors with more than 100 members. Honorary co-chairs include the governor of Utah and the Chairman and CEO of a local foundation. Scheer (2012) notes the chairman recruited steering committee members with visibility and influence in public policy.

Initially, the group established sub-committees to manage specific efforts. These committees included a steering committee overseeing the day-to-day work of the organization, a scenarios committee providing oversight and technical assistance for scenario planning work, a public awareness committee developing and overseeing outreach and public relations, and a quality growth efficiency tools technical committee tasked with identifying and engaging technical tools in support of scenario planning and quality growth strategy.

The organization's annual report indicates funding sources are primarily private and nonprofit. However, their governance includes representation from all sectors, including private, non-profit, education, faith communities, and city, county, and state government elected officials and staff.

PROCESS

Their initial process began in 1997 in response to concerns about the negative externalities often associated with economic development (e.g., congestion, air quality). The group established a three-step process designed to engage residents in the creation of a shared vision for the future. The process has been used at both the regional and community level.

Step one is to set the stage. It involves assessing local values, engaging stakeholders to scope the issue and establish a baseline scenario (e.g., what would happen if trends continue and nothing changes). Key to this step is coordinating with local community leaders and communicating broadly about the group's effort and the importance of citizen involvement.

Step two is public participation in workshops. Through a series of public events, citizen reactions to the baseline scenario are gathered. The feedback is then summarized and disseminated broadly to stakeholders and the public at large.

Step three is the development, evaluation, and selection of future scenarios. Based on feedback gathered in earlier steps, alternative scenarios are created to illustrate the consequences of different decisions related to transportation, environmental conservation, housing development, etc. Citizens discuss and analyze these scenarios in community meetings and via online surveys, ultimately selecting their preferred scenario and the decisions associated with that scenario.

Envision Utah's original process included more than 200 workshops and engaged more than 20,000 residents between 1997 and 1999, resulting in a regional plan called the Quality Growth Strategy. The Strategy was market-based, voluntary, locally implemented, and strategically aligned with future scenarios preferred by the participants in the process.

Between 2013 and 2016, the group embarked on an updated process called "Your Utah, Your Future Vision for 2050." This effort engaged more than 50,000 citizens.

ACTIVITIES

The most recent process, which took place between 2013 and 2016 and looks ahead to 2050, led to 11 action areas. These action areas include jobs and economy, air quality, water, education, housing and cost of living, energy, agriculture, disaster resilience, public lands, transportation, communities, and recreation. EnvisionUtah has taken and action in these areas around four cornerstones, allowing individual, government, and private sector efforts within each action area. Their cornerstone concepts are a network of quality communities, homes, buildings, landscapes, cars of the future, a thriving rural area, and individuals prepared for the future.

Envision Utah engages a variety of partners to support implementation. It also provides technical assistance, workshops, and toolkits for local governments aligned with the region's planning priorities and goals.

KEY LEARNINGS

Several key learnings are noted in the organization's historical documentation. First, the presence of well-known and respected individuals serving as champions of the effort is noted. These champions could also be characterized as integrative leaders, inviting and engaging a broad cross section of participants in the process, thereby

broadening the leadership base. Second, partner organizations, like the state's planning department, contributed a stunning amount of in-kind support in the form of staff and technical assistance. Third, the approach is tailored to a local context, meaning local control is preserved. A summary of the model produced by the Brookings Institution (Scheer, 2012) also notes four learnings that may be applicable to similar efforts. These learnings include attention to capacity and sustainability of the lead organization, skillful use and communication of data and analysis to stakeholders and the public, plans and principles aligned with public values, and a thoughtful and appropriate structure.

Northern Idaho: Clearwater Economic Development Association

The Clearwater Economic Development Association (CEDA) is a 501c4 membership organization initially established in 1968. Its work covers five counties in Northern Idaho, and its mission is to "help North Central Idaho business and communities by serving as a conduit to needed resources." Members include representatives from local government (county, city, tribal, and special administrative districts), higher education, industry, and non-profit organizations with an interest in strengthening and diversifying the regional economy. The group structures its work around business development, community development, and regional development.

STRUCTURE AND GOVERNANCE

CEDA's governance structure includes a 21-member board of directors; 12 members represent local governments, three are from the private sector, and six represent stakeholder organizations, such as higher education and economic development organizations. The board provides oversight, sets organizational policy, and leads and evaluates issues and initiatives with regional impact. The group also has four working councils and two standing committees. Those serving on the councils and committees are a mix of board and organization members. Councils are organized around operations, economic and community development, workforce development, and business development and finance. A loan review committee also reviews and decides on business funding requests to the CEDA finance program, as well an asset management committee that oversees the organization's assets.

PROCESS

The Comprehensive Economic Development Strategy (CEDS) planning process aligns with the goals of the Federal Economic Development Administration and guides much of the organization's economic development work. Their 2015 CEDS planning process occurred during a 12-month period and was the result of six planning meetings—three with their 55-member planning team and three with their CEDS oversight committee—which had final authority to approve the plan. During this time, the planning team reviewed research, data, and asset maps provided by the University and State of Idaho government departments. They also completed a SWOT analysis, devised an asset map, and considered themes emerging from recent economic development summits, as well as the expertise and experience of team members. This work, along with staff support,

led to the creation of CEDS. The final plan was made public for review and comments for 60 days.

ACTIVITIES

Partners involved in CEDA share responsibility for implementation and leadership of CEDS activities. For other activities, CEDA or an association partner takes the lead. Core activity areas include business development, community development, and regional development. They are actively engaged in workforce development, having established a workforce development board in 2012. Staff coordinate with partners to offer programs and services across the region, including a manufacturer's forum, a youth employment conference, and involvement with the "Dream it. Do it." network.

KEY LEARNINGS

Regional collaboration takes time and effort, as well as financial resources. However, it is all worth it, according to Executive Director Christine Frei. She believes they would not have progressed half as much if they were not continually "inviting, encouraging, and accepting help from partners."

Collaboration History in Southeastern Minnesota

Collaboration across government, business, and non-profit sectors and spanning geographic borders is not a new concept in Southeast Minnesota. The region did have a regional development commission until the early 1980s, and several collaborative efforts currently exist across the region.

Existing models include both formal and informal collaborations across geographies and sectors. Examples of formal collaborations include the Southeast Minnesota Service Cooperative, Southeast Minnesota League of Municipalities, Southeast Minnesota Community Action Agency, the Root River Watershed plan, Workforce Investment Board, the Minnesota Prairie County Alliance, and a number of others.

Informal collaboration examples include the FEAST! Food network, Southeast Minnesota Social Justice Coalition, Region 10 Quality Council, among others. Some of those interviewed as part of this report mentioned that regional gatherings of economic development, chamber, city, and county staff were also additional examples of informal collaboration in the region.

During interviews, some people involved with these and other efforts shared what they believed were success factors. These factors included funding for the effort (e.g., state or federal grants), a trusted convener to facilitate the conversation, a clear benefit to collaboration for all involved, a clear focus (a topic-specific effort), and building trust and momentum through coordinated successful action.

Those interviewed also shared examples of attempted collaborations and shared their perspective on why these efforts did not thrive. Factors impeding success included

disagreements over power and control within the collaboration, a feeling that participant perspectives were not being heard and integrated, a lack of demonstrated results, lack of funding or human resources to do the work, and the absence of a mechanism to convene (as simple as no one scheduled meetings).

The history of the regional development commission did come up in a handful of conversations. One individual suggested its dissolution was primarily due to its inability to demonstrate value to the broader region at a time when state and federal support for RDCs was diminishing and local stakeholders would need to contribute resources. This theory appears to be reinforced by a report on the history of the dissolution (Dhein, Schroeder, Johnson, & Holewa, 1982). However, the vote to dissolve was not unanimous. With 25 supporting dissolution and 21 opposing, almost half of those voting saw enough value in the idea of regional government to continue the experiment (Dhein, Schroeder, Johnson, & Holewa, 1982).

Experiences, Beliefs, and Climate Related to Regional Collaboration

About 20 individuals from across the region were interviewed as part of the research for this report. They included county commissioners, nonprofit directors, chamber leadership, city and EDA staff, and others with experience and interest in the topic. Conversations during the interviews uncovered a range of individual experiences and beliefs and revealed insight into the current political climate related to regional planning and collaboration.

A number of themes emerged from the interviews, which are summarized below.

Southeast Minnesota Defined

Generally, people conceptualized the boundaries of Southeast Minnesota in terms of the Region 10 outline that encompasses the following counties: Dodge, Goodhue, Houston, Fillmore, Freeborn, Mower, Olmsted, Rice, Steele, Wabasha, and Winona. A handful of those interviewed further clarified that sub-regions exist and can be defined in economic terms. These included the areas surrounding economic centers like Austin, Faribault, Red Wing, Rochester, Owatonna, and Winona.

Rochester versus the Region

Southeast Minnesota has several robust regional centers, including one with a world-wide reputation due to the Mayo Clinic. Additionally, the Rochester metropolitan statistical area represents about 43 percent of the region's population (as defined by Region 10 boundaries). The communities in the region are party to the opportunities and challenges facing Rochester. While many acknowledged interdependence, they lamented the presence of power dynamics between Rochester and the rest of the region, acknowledging that such dynamics impede deep regional collaboration.

Value in Collaboration and Need to Demonstrate Results

Overall, those interviewed saw value in collaboration. Reasons for this include gaining efficiency, increasing effectiveness, and the ability to more effectively address borderless issues. They feel collective ideas and resources can lead to greater impact than individual organizations working in silos. Several expressed value in continuing the convening role that SE MN Together has played to date, bringing together stakeholders from across the region to consider action on common issues.

That said, some did mention caveats. One included balancing regional collaboration with local control. This may mean acknowledging that not every issue requires a region-wide approach, and that a solution in one community may not work the same in another. A few people expressed skepticism about regional efforts, explaining they had participated in regional collaborations that did not create results, despite the time and effort spent. One person shared, "Every time we try to do a regional effort, it tends to fail. It becomes less tangible really fast." Several emphasized the importance of producing tangible results that are relevant locally.

Drivers and Climate for Collaboration

Conversations with stakeholders confirmed that policy changes, the presence of a respected convener, and financial incentives drive many of the current collaborations. The general sentiment among those interviewed was that the climate is right for more collaboration, but activities must ensure a return on investment for time and money spent. One interviewee mentioned the Destination Medical Center (DMC) effort was a wake-up call for communities outside Rochester. The investment would have regional ripples, but in the absence of coordination and communication, opportunities may be missed and existing issues, like the workforce shortage, may be exacerbated.

Another person said that 20 years ago, the prevailing mindset was competition with neighbors. Today, however, folks are embracing the idea of working together and looking for collaboration opportunities.

Several mentioned the value of informal collaborations, such as opportunities to share ideas and best practices and then build from there. One interviewee suggested informal collaborations may lead to a more formal structure over time (5+ years) as trust is built between the various players.

Lack of Awareness of SE MN Together

Among those interviewed, the overall level of awareness of SE MN Together's efforts was moderate to low. Some had participated in the original meeting, and knew certain members of the leadership team, but had not stayed engaged and were unaware of any future action taken.

Advice for SE MN Together

Clarity in purpose and role, as well as a focus on critical outcomes is key. Is SE MN Together a convener or providing information, attempting to influence policy, or

coordinating activities? One interviewee shared how important it is to choose one issue to make an impact on, then using that success to explore and address other corollary issues. As one person mentioned, "You can't be all things to all people."

Recognize the work of others that are addressing the same issues as the group. Ensure those with a shared stake in the matter are included in discussions, not just informed of a decision after it has been made. As one person said, "Be careful not to duplicate."

Ensure broad representation from all parts of the region, including Rochester. One interviewee mentioned, "The more players that can be involved, the better."

Another interviewee shared a possible successful model for collaboration, which includes a topical focus that engages community leaders from outside county and city units. The interviewee suggested beginning the process with a convening to define the issue, and then determine who is in the best position to take the lead. Then, meet regularly for accountability.

Conclusion and Considerations for Next Steps

Regional, cross-sector collaboration is not an exact science. More often than not, it is a messy, long, tenuous exercise. No perfect model or map exists to achieve regional goals. What works in one region may not work well in another. Successful models and strategies emerge from the local context and processes engaged. Figure 4 highlights the considerations that influence and inform decisions about regional, cross-sector collaboration.

Figure 4: Considerations for Engaging in Collaborative Efforts

Structure	Informal ⟷	Formal
Time period	Temporary ⟷	Permanent
Scope	Single issue ⟷	Multi-issue
Partners	Few ⟷	Many
Geography	Local ⟷	International
Governance	Ad hoc coalition ⟷	Formal Organization
Complexity	Simple ⟷	Complex

There is a history of collaboration in Southeast Minnesota, however, and we can look at other models and research to pair with the local context to consider options for the next iteration of SE MN Together. What follows are suggestions for the group to consider as they continue their journey.

Define the region and specific scope of the effort. Make sure the work aligns with regional values that have been identified through a stakeholder engagement process. A remark from an individual involved with Envision Utah effort is telling: "Values analysis shows us that what we have in common is greater than what separates us. We were able to communicate more effectively at the values level and build plans that give residents what they most want." (Scheer, 2012, p. 18). In Southeast Minnesota, is there agreement on the issues and the path forward? Is there a clear sense of the values

shared by the residents in Southeast Minnesota? Is SE MN Together's work aligned with those values? What are the boundaries of the work (e.g., geographic, activities, issue areas)? Continue to pursue opportunities to build shared meaning and a shared roadmap toward a desired future. Consider the examples of Envision Utah and the Resilient Region Plan, which both used scenario-planning methods. Focus on the group's priorities and determine which should be addressed regionally and which should be addressed by a sub-regional effort.

Build trust and legitimacy by demonstrating impact and value**.** Celebrate small wins to build credibility with internal and external stakeholders. You cannot "over communicate" about the work, how to get involved, and the progress being made.

Expand your reach by thoughtfully engaging a broader range of stakeholders. As one interviewee pointed out, "People want to be more connected to information and to each other." The literature indicates that power imbalances can be a threat to effective collaboration. This was reflected in the comments made by some interviewees who mentioned the tension between Rochester and Olmsted County and the surrounding counties and cities. SE MN Together might consider opportunities to build trust and social capital between stakeholders in and around Rochester, as well as the broader region.

Recall that structural and governance choices vary based on the purpose of the collaboration. Is it policy-making, project-based, exchanging resources, designing strategy, or some combination of these initiatives? Is there clear agreement on the role that SE MN Together serves? Is it meant to act as a convener and then allow players to come together to move activities forward? Is the group moving efforts forward as an entity on its own?

SE MN Together appears to operate somewhere between a participant governed network and a lead organization governed network, considering its recent connection with the University of Minnesota Regional Sustainable Development Partnership (RSDP), which provided coordination for the group from mid-2016 through early 2018. Its structure follows the wheel framework with small groups working on projects, then reporting to the hub. As a non-mandated coalition, an emergent planning feature seems appropriate. A structure and governance model that facilitates progress on shared priorities and goals but also allows flexibility to adapt and evolve would be appropriate. A participant governed network or lead organization model seem aligned with this principle. However, as Kenis and Provan suggest, all models require a network manager.

A final consideration is the concept of evolution and cycles of action, reflection, and refinement. The *Collaboration Handbook* describes the cycles of a collaboration as exploration, development, maturity, and creative destruction. Academic literature, as well as practitioners of collaboration acknowledge that cooperative efforts, because

they engage multiple parties over time, are not generally static entities. The structures, the issues addressed, and the approaches used can all evolve.

While the challenges to cross-sector, cross-border collaboration exist, the rewards can be great.

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